



EHR EVALUATION GUIDE

For Solo and Group Practices

Regardless of whether you are just starting out or have had a therapy practice for years, your electronic health record (EHR) is the heart of your operation. If you select the wrong EHR partner you may spend more time doing paperwork and admin tasks than you do caring for your clients. This scenario leads to increased burnout and can harm client outcomes. So how do you make the right EHR decision for your unique practice? Below are some key attributes to consider when evaluating your EHR partner.

Operational considerations



How well does the EHR support fast initial set up?

This includes helping you define what hours you'll practice, what services you'll offer, and how much you'll charge. Look for step-by-step guidance that takes away the guesswork of whether you're setting it up correctly.

Notes



How flexible is the EHR in adapting to your practice's policies?

This includes accommodating your policies for things like client cancellations. Look for a system that can be easily configured to support the policies that are important to you. The EHR should adapt to you, not the other way around.

Notes



Financial considerations



How efficiently does the EHR enable you to document for billing?

This includes enabling you to make clinical notes and document for billing at the same time. If billing-related documentation has to be done separately from your clinical encounter notes, it can add hours to your day and prevent you from seeing more clients. Look for an EHR that enables clinical notes and billing items to be documented concurrently.

Notes



How seamless is it to work with insurance companies through the EHR?

If you accept insurance, this includes making use of clearinghouse services, which streamline claims submissions and get you paid faster. Look for an EHR that integrates with a clearinghouse, ideally an in-house clearinghouse service so that you have a simple experience working with claims.

Notes

Clinical considerations



How customizable are the EHR's clinical forms?

A lot of data entry happens in clinical forms within an EHR. Without customizable forms, you may have to manage clinical forms that aren't easy to use and may be outside of the EHR – taking your time away from client care. Look for an EHR that allows form customizations, with a track record of success and satisfied therapists.

Notes



How robust is the EHR's client portal?

This includes making it easy for your clients to schedule appointments, fill out intake forms, and pay their bills on the EHR's client portal. Look for an EHR that minimizes frustration through simple self-service features for clients.

Notes



How secure is the EHR and your client data?

With data breaches becoming more common, protecting your clients' information has never been more important. Look for an EHR that is HIPAA compliant, offers role-based security, with data safely managed in the cloud.

Notes



Your unique practice deserves high-quality support from an EHR partner that “gets you”.

Making the most informed EHR choice may take some time upfront, but you'll end up spending less time on administration and more time improving the lives of your clients. When you choose the EHR that's the right fit for you, you'll be set up for an easy experience, greater financial stability, and better clinical outcomes.